# PARTWeb Users Manual

Office of Management and Budget
Budget Systems Branch
v. May 2, 2005

# Contents

# Purpose of This Document

This document is a resource manual for using PARTWeb. The document contains an overview of the system and its features, specific instructions for using those features, and points of contact for technical assistance in troubleshooting.

Additional copies of this help manual may be obtained on-line at
http://www.whitehouse.gov/omb/part/PARTWeb/PARTWeb_user_manual.pdf

# Introduction to PARTWeb

As its name implies, PARTWeb is an interactive, web-based database designed to collect and monitor information related to Federal program evaluations conducted under the Program Assessment Rating Tool (PART) process. The PART was developed to assess and improve program performance so that the Federal government can achieve better results. A PART review helps identify a program's strengths and weaknesses to inform funding and management decisions aimed at making the program more effective. The PART therefore looks at all factors that affect and reflect program performance including program purpose and design; performance measurement, evaluations, and strategic planning; program management; and program results. Because the PART includes a consistent series of analytical questions, it allows programs to show improvements over time, and allows comparisons between similar programs.

# PARTWeb's Features

PARTWeb is used by both Federal agencies and the Office of Management and Budget (OMB) to complete and collaborate on required elements of PART. Major features and components include:

- A secure user- and agency-based ID system that ensures secure collaboration within agencies and within OMB, depending on the stage of PART completion.

- The ability for agencies and OMB units to set up user accounts and manage access levels.

- Direct access for entering PART data using a web-based application. By using PARTWeb, agencies can create a new PART assessment, edit an existing assessment, enter funding data, answer and edit PART questions, enter performance measures, and report on progress toward implementing OMB recommendations regarding a PARTed program.

- The ability for all PARTWeb users to view and search all completed PART assessments (there are currently about 607 completed assessments in OMB's database). This encourages information sharing and collaboration between agencies, and offers opportunities to exchange lessons learned and best practices.

- Standard XML format to facilitate data exchange with other agency management and budget systems.

# Section 1: Accessing PARTWeb

## User IDs and Passwords

PART application administration will be performed by delegating authority to one or more agency administrators or coordinators. These agency administrators must first complete a user ID request form (see Appendix A). The completed form must be faxed, along with a photocopy of the user applicant's Federal photo ID, to the OMB, Budget Systems Branch at (202) 395-5080. OMB will assign requesting users their user ID and password.

Agency PART administrators will manage the PARTWeb process at the agencies by providing access to the on-line application to additional agency staff who are working on specific PARTs. PART administrators will assign user IDs in the form of a user's email address. The administrators will also assign temporary user passwords (the users can change the temporary password to a password of their choice after initial access to the system).

If you are an agency user requiring access to PARTWeb, please contact your Budget or Strategic Planning office for the name of your Agency PART administrator.

## PARTWeb User Roles and Responsibilities

Definitions of various types of PARTWeb users follow. Agency and OMB administrators set user access levels depending on their role in the PART process.

- **Agency Admin** - These users are responsible for agency UserId administration and assigning PART's within an agency. More than one agency user can be assigned to update a PART. Agency Admins can read/update all PART's within an agency. These users can also create new programs to be PARTed for their assigned agency.

- **Agency User** - These users can only read all PART's within an agency, but only update those programs assigned to them.

- **Agency Review** - These users have read-only access to assigned PART programs.

- **OMB Admin** - These users are responsible for granting read/update access to OMB users and Agency Admin's.

- **OMB User** - users can only read all PART's within an agency, but only update those PART's assigned. These users can also create new programs to be PARTed for their assigned agencies.

- **OMB Review** - These users will have read-only access to assigned PART programs.

## PARTWeb URL

Once you have a user account established in PARTWeb, open your browser and go to: https://max.omb.gov/app/part/. Enter your user ID and password and you will be in the system at the Program Assessment Rating Tool (PART) page. This is also referred to as the PARTWeb home page.
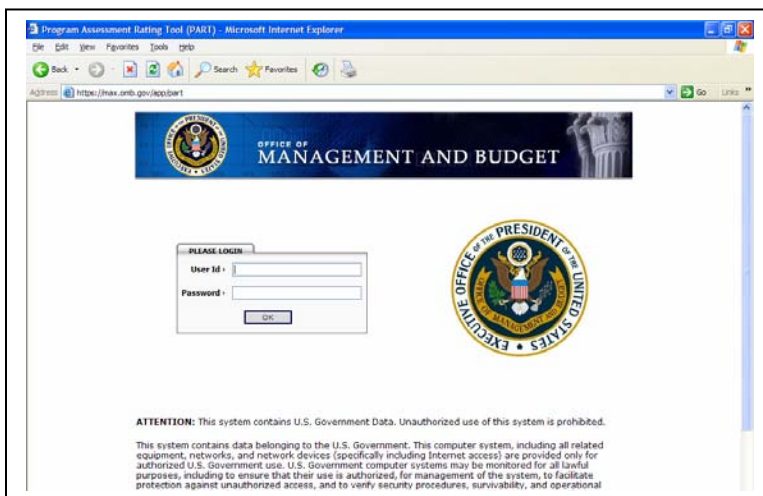


Note: You can change your temporary password by clicking on the "Administration" link and selecting "Users." Click on your name and the "Edit User" button on the "Account Information" panel. (Note: See Section 4 for more information regarding adding and editing users.)

# Section 2:  PART Program Management

## Creating a new program

In PARTWeb, PART assessments are conducted under specific agency programs. The program must first exist or be established in PARTWeb before a PART assessment can be created.  Only agency and OMB administrators or agency users who have been given permissions (y the agency or OMB administrator (see section on User Permissions) can create a new program.  This will be done in mutual agreement between OMB and the agency PART administrator. To establish a new program, the user must first have a program code.  The program code should be obtained from the OMB examiner.

To create a new program:

1.  Login to PARTWeb as an admin user or a user with permissions to create a new program. You should now be on the "Program Assessment Rating Tool (PART)" page.
2.  Click the "Register New Program" link. This will bring you to the *Register New Program* page.
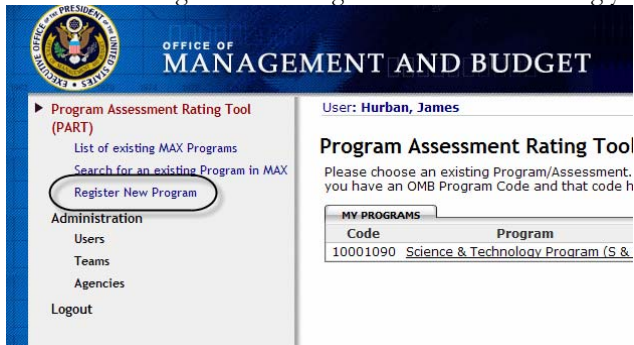


3.      Enter data into the New Program dialog as follows:

4. Press the "Save" button. Verify that you are taken to the *Program Home Page* and can see your new program.

**Test Program 001**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Direct Federal Program |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Test Program 001 Notes |

**ASSESSMENTS**
Year  Notes  Actions

Create New Assessment

## Editing an existing program

1. From the Home Page, click the appropriate Program title or go to the Program Home Page.

**Program Assessment Rating Tool (PART)**

Please choose an existing Program/Assessment. If your PART does not appear on this screen, y
you have an OMB Program Code and that code has not already been used to associate a progra

| MY PROGRAMS | | | | |
|---|---|---|---|---|
| Code | Program | Assessments | Notes | Actions |
| 10001090 | Science & Technology Program (S & T) | 2005 | | New Assessment |
| TEST_001 | Test Program 001 | | | New Assessment |

2. Click the "Edit Program" link from the navigation menus area.

List of existing MAX Programs
Search for an existing Program in MAX
Register New Program
► Test Program 001
    Edit Program
    User Permissions
    Team Permissions
    Create New Assessment
    Program XML
Administration
    Users

**Test Program 001**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Direct Federal Program |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Test Program 001 Notes |

**ASSESSMENTS**
Year  Notes  Actions

Create New Assessment

3. Edit the contents of the Notes and Program Types fields as follows:

**Edit Program**

| | |
|---|---|
| *OMB Program Code ▸ | TEST_001 |
| *Program Title ▸ | Test Program 001 |
| Contact Name ▸ | Test User 001 |
| Contact Email ▸ | test.user@test.gov |
| Contact Phone ▸ | 202-555-1212 |
| Notes ▸ | Modified Notes for Test Program 001 |

☑ Direct Federal Program (DF)
☐ Research and Development Program (RD)
☑ Block/Formula Grant (BF)
*Program Type(s) ▸ ☐ Regulatory-based Program (RG)
☑ Competitive Grant Program (CO)
☐ Credit Program (CR)
☐ Capital Assets and Service Acquisition Program (CA)

SAVE   CANCEL

4. Click the "Save" button and verify that the changes were made appropriately.

**Test Program 001**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Direct Federal Program , Block/Formula Grant |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Modified Notes for Test Program 001 |

**ASSESSMENTS**
Year  Notes  Actions

Create New Assessment

# Section 3:  Completing Your PART

## Creating/Editing Assessments

### Creating a new assessment

Once you have created or edited a program, the next step in the PARTWeb process is to create a record that will house data about your PART evaluation. This is called the assessment.  Once you create a new assessment, you can access related data fields in PARTWeb such as the screens for inputting answers to questions, performance measures, and recommendations.

### To create a new assessment:

1. Login as an admin user or a user with permissions to create/edit a new assessment.
2. From the Home Page, click your appropriate Program title to go to the Program Home Page.

**Program Assessment Rating Tool (PART)**

Please choose an existing Program/Assessment. If your PART does not appear on this screen, y
you have an OMB Program Code and that code has not already been used to associate a progr

**MY PROGRAMS**

| Code | Program | Assessments | Notes | Actions |
|------|---------|-------------|-------|---------|
| 10001090 | Science & Technology Program (S & T) | 2005 | | New Assessment |
| TEST_001 | Test Program 001 | | | New Assessment |

1. Click the "Create New Assessment" link from the navigation menus area.

List of existing MAX Programs
Search for an existing Program in MAX
Register New Program
▶ Test Program 001
    Edit Program
    User Permissions
    Team Permissions
    Create New Assessment
    Program XML
Administration
    Users

**Test Program 001**

**SUMMARY**

| | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Block/Formula Grant , Direct Federal Program |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Modified Notes for Test Program 001 |

**ASSESSMENTS**

| Year | Notes | Actions |
|------|-------|---------|

Create New Assessment

2. Enter data into the dialog as follows:

**Create New Assessment**

Summary Information
*Year ▸ 2005
*Status ▸ Initial Agency working draft
Notes ▸ Test Program 001 2005 Assessment

Funding Levels for PART Summary Tables (in millions)
Prior Year ▸
Current Year ▸
Budget Year ▸

SAVE  CANCEL

3. Press the "Save" button. Verify that you are brought back to the Program Home Page and that the new assessment is shown on the page.

**Test Program 001**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Direct Federal Program , Block/Formula Grant |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Modified Notes for Test Program 001 |

| ASSESSMENTS | | |
|---|---|---|
| Year | Notes | Actions |
| 2005 | Test Program 001 2005 Assessment | |

Create New Assessment

## Editing an existing assessment

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.

**Program Assessment Rating Tool (PART)**

Please choose an existing Program/Assessment. If your PART does not appear on this screen, y
you have an OMB Program Code and that code has not already been used to associate a progr

| MY PROGRAMS | | | | |
|---|---|---|---|---|
| Code | Program | Assessments | Notes | Actions |
| 10001090 | Science & Technology Program (S & T) | 2005 | | New Assessment |
| TEST_001 | Test Program 001 | | | New Assessment |

3. Click the appropriate assessment year link from the navigation menus area.

**Test Program 001**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Direct Federal Program , Block/Formula Grant |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Modified Notes for Test Program 001 |

| ASSESSMENTS | | |
|---|---|---|
| Year | Notes | Actions |
| 2005 | Test Program 001 2005 Assessment | |

Create New Assessment

4. Click the "Edit Assessment" link from the navigation menus area.

List of existing MAX Programs
Search for an existing Program in MAX
Register New Program
Test Program 001
   Edit Program
   User Permissions
   Team Permissions
   Create New Assessment
► 2005 Assessment
    Edit Assessment
    User Permissions
    Team Permissions

**Test Program 001 2005 Assessment**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Block/Formula Grant , Competitive |
| Assessment Year | 2005 |
| Assessment Status | Initial Agency working draft This version should be used only for OMB review (applicable if agen |
| Assessment Notes | Test Program 001 2005 Assessm |

**Program funding Level (in millions)**

5. Edit the contents of the Notes and Funding level fields as follows:

**Edit Assessment**

Summary Information
*Year ▸ 2005
*Status ▸ Initial Agency working draft
Notes ▸ Test Program 001 2005 Assessment Modified Notes

Funding Levels for PART Summary Tables (in millions)
Prior Year ▸ 100
Current Year ▸ 200
Budget Year ▸ 300

SAVE    CANCEL

6. Click the "Save" button and verify that the changes were made appropriately.

## Creating/Editing a Funding Account

### Creating a new assessment funding account

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.



3. Click the appropriate assessment year link from the navigation menus area.



4. Click the "Funding Accounts" link from the navigation menus area.



5. Click the "Add Funding" button from the funding panel page.



6. Edit the contents of the Funding Account fields as appropriate:

8. Click the "Save" button and verify that the changes were made appropriately.

## Editing an existing assessment funding account

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Programtitle to go to the Program Home Page.



3. Click the appropriate assessment year link from the navigation menus area.



4. Click the "Funding Accounts" link from the navigation menus area.



5. Click the "Edit" link on the funding panel page.



6. Edit the contents of the Funding Account fields as appropriate:

7. Click the "Save" button and verify that the changes were made appropriately.

# Questions

## Creating new question answers

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.



3. Click the appropriate assessment year link from the navigation menus area.



4. Click the "Question Answers" link from the navigation menus area.



5. Click the "Unanswered" link on the Question Answers area.

## Question Answers

**TEST PROGRAM 001 2005 ANSWERS**

You have answered 0 of 25 questions. You may assign question weights once you have decided whether questions are applicable to your program or not.

| Num | Question | Answer | Exp | Evd | Score |
|-----|----------|--------|-----|-----|-------|
| **Section 1** | | | | | |
| 1.1 | Is the program purpose clear? | Unanswered | | | |
| 1.2 | Does the program address a specific and existing problem, interest or need? | Unanswered | | | |
| 1.3 | Is the program designed so that it is not redundant or duplicative of any other Federal, state, local or private effort? | Unanswered | | | |
| 1.4 | Is the program design free of major flaws that would limit the program's effectiveness or efficiency? | Unanswered | | | |
| 1.5 | Is the program effectively targeted, so that resources will reach intended beneficiaries and/or otherwise address the program's purpose directly? | Unanswered | | | |
| | | | | | 0% |
| **Section 2** | | | | | |
| 2.1 | Does the program have a limited number of specific long-term performance measures that focus on outcomes and meaningfully reflect the purpose of the program? | Unanswered | | | |
| 2.2 | Does the program have ambitious targets and timeframes for its long-term measures? | Unanswered | | | |
| 2.3 | Does the program have a limited number of specific annual performance measures that can demonstrate progress toward achieving the program's long-term goals? | Unanswered | | | |
| 2.4 | Does the program have baselines and ambitious targets for its annual measures? | Unanswered | | | |

6. Enter data into the appropriate explanation and evidence fields and click on the appropriate radio button to answer the question (yes, no, N/A, to large extend, to small extent, etc.):

## Is the program purpose clear?

**DIRECT FEDERAL PROGRAM QUESTION 1.1**

Answer ▸  ○ Yes  ○ No  ○ Not Applicable

Explanation ▸ [                    ]

Evidence ▸ [                    ]

Previous versions:

None.

[ SAVE ]  [ CANCEL ]

1.1 Is the program purpose clear?

Purpose of the question: to determine whether the program has a focused and well-defined mission. Determining this purpose is critical to determination of useful performance measures and targets.

7. Click the "Save" button and verify that the changes were made appropriately. The user will be directed to the next question in the list. Verify that the next dialog is for the appropriate question.

## Editing existing question answers

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.

### Program Assessment Rating Tool (PART)

Please choose an existing Program/Assessment. If your PART does not appear on this screen, y you have an OMB Program Code and that code has not already been used to associate a progra

**MY PROGRAMS**

| Code | Program | Assessments | Notes | Actions |
|------|---------|-------------|-------|---------|
| 10001090 | Science & Technology Program (S & T) | 2005 | | New Assessment |
| TEST_001 | Test Program 001 | | | New Assessment |

3. Click the appropriate assessment year link from the navigation menus area.

Test Program 001

SUMMARY

| Program Code | TEST_001 |
|---|---|
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Direct Federal Program , Block/Formula Grant |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Modified Notes for Test Program 001 |

ASSESSMENTS

| Year | Notes | Actions |
|---|---|---|
| 2005 | Test Program 001 2005 Assessment | |

Create New Assessment

4. Click the "Question Answers" link from the navigation menus area.

Programs
Search for an existing
Program in MAX
Register New Program
**Test Program 001**
    Edit Program
    User Permissions
    Team Permissions
    Create New Assessment
  ► 2005 Assessment
        Edit Assessment
        User Permissions
        Team Permissions
        Funding Accounts
        Question Answers
        Question Weights
    Performance
    Measures
    Recommendations

Test Program 001 2005 Assessment

SUMMARY

| Program Code | TEST_001 |
|---|---|
| Program Title | Test Program 001 |
| Program Type(s) | Direct Federal Program |
| Assessment Year | 2005 |
| Assessment Status | Initial Agency working draft This version should be used only once PART, not yet ready for OMB review (a is doing the first draft) |
| Assessment Notes | Test Program 001: 2005 Assessment |

**Program funding Level (in millions)**

| Prior Year | $100.00 |
|---|---|
| Current Year | $200.00 |
| Budget Year | $300.00 |
| Explanation of Composition of Funding | |

TEST PROGRAM 001 2005 FUNDINGS

5. Click the "Answer" link on the Question Answers panel area.

Question Answers

TEST PROGRAM 001 2005 ANSWERS

You have answered 25 of 25 questions. You may assign question weights once you have decided whether questions are applicable to your program or not.

| Num | Question | Answer | Exp | Evd | Score |
|---|---|---|---|---|---|
| **Section 1** | | | | | |
| 1.1 | Is the program purpose clear? | YES | ☑ | | 20% |
| 1.2 | Does the program address a specific and existing problem, interest or need? | YES | ☑ | | 20% |
| 1.3 | Is the program designed so that it is not redundant or duplicative of any other Federal, state, local or private effort? | YES | ☑ | | 20% |
| 1.4 | Is the program design free of major flaws that would limit the program's effectiveness or efficiency? | YES | ☑ | | 20% |
| 1.5 | Is the program effectively targeted, so that resources will reach intended beneficiaries and/or otherwise address the program's purpose directly? | YES | ☑ | | 20% |
| | | | | | 100% |
| **Section 2** | | | | | |
| 2.1 | Does the program have a limited number of specific long-term performance measures that focus on outcomes and meaningfully reflect the purpose of | YES | ☑ | | 10% |

6. Edit the contents of the appropriate explanation and/or evidence fields or edit the "answer" radio button appropriately:

Is the program purpose clear?

DIRECT FEDERAL PROGRAM QUESTION 1.1

Answer ›  ⦿ Yes  ○ No  ○ Not Applicable

Explanation ›  Answer Explanation modified

Evidence ›

SAVE   CANCEL

Previous versi

Date/Time
Unknown

1.1 Is the program purpose clear?

Purpose of the question: to determine whether the program has a focused and well-defined miss
Determining this purpose is critical to determination of useful performance measures and targets

7. Click the "Save" button and verify that the changes were made appropriately.

## Creating new question answer weights

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.



3. Click the appropriate assessment year link from the navigation menus area.



4. Click the "Question Weights" link from the navigation menus area.



5. Edit the contents of the Question Weight fields: (Note: Agencies should collaborate closely with their OMB examiners before adjusting question weights.)

6. Click the "Save Question Weights" button and verify that the appropriate changes were made. Note: the user will not be able to save question weights unless all weights have been entered.

## Editing question answer weights

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.



3. Click the appropriate assessment year link from the navigation menus area.



4. Click the "Question Weights" link from the navigation menus area.

5. Edit the contents of the Question Weight fields (note: agencies must ensure their OMB examiners are in agreement with any changes made to question weights)::



6. Click the "Save Question Weights" button and verify that the appropriate changes were made. Note: the user will not be able to save question weights unless all weights have been entered.

## Performance Measures

### Create new assessment performance measures

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.



3. Click the appropriate assessment year link from the navigation menus area.

**Test Program 001**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Direct Federal Program , Block/Formula Grant |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Modified Notes for Test Program 001 |

| ASSESSMENTS | | |
|---|---|---|
| Year | Notes | Actions |
| 2005 | Test Program 001 2005 Assessment | |

Create New Assessment

4. Click the "Performance Measures" link from the navigation menus area.

Programs
Search for an existing Program in MAX
Register New Program
**Test Program 001**
  Edit Program
  User Permissions
  Team Permissions
  Create New Assessment
▶ 2005 Assessment
    Edit Assessment
    User Permissions
    Team Permissions
  **Funding Accounts**
  **Question Answers**
  **Question Weights**
  **Performance Measures**
  **Recommendations**

**Test Program 001 2005 Assessment**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Direct Federal Program |
| Assessment Year | 2005 |
| Assessment Status | Initial Agency working draft (This version should be used or PART, not yet ready for OMB re is doing the first draft) |
| Assessment Notes | Test Program 001: 2005 Asses |

**Program funding Level (in millions)**

| Prior Year | $100.00 |
|---|---|
| Current Year | $200.00 |
| Budget Year | $300.00 |
| Explanation of Composition of Funding | |

| TEST PROGRAM 001 2005 FUNDINGS | |

5. Click the "Add Performance Measure" button from the performance measure page.

**Test Program 001 Performance Measures**

| TEST PROGRAM 001 2005 PERFORMANCE MEASURES | | |
|---|---|---|
| Add Performance Measure | | |
| Term | Type | Text |
| No Performance Measures defined. Click "Add Performance Measure" above to define one. | | |

6. Enter the contents of the Performance Measure fields.

**Create New Performance Measure**

| ADD PROGRAM PERFORMANCE MEASURE | |
|---|---|
| Term / Type / State ▸ | Long-term ▼  Outcome ▼  [ ▼ ] |
| Performance Measure ▸ | |
| Explanation ▸ | |

| Targets ▸ | | | | |
|---|---|---|---|---|
| | Year | Target | Actual | State |
| | | | | ▼ |
| | | | | ▼ |
| | | | | ▼ |
| | | | | ▼ |
| | | | | ▼ |
| | | | | ▼ |
| | | | | ▼ |
| | | | | ▼ |
| | | | | ▼ |
| | | | | ▼ |

SAVE  CANCEL

7. Click the "Save" button and verify that the appropriate changes were made.

## Edit existing assessment performance measures

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.



3. Click the appropriate assessment year link from the navigation menus area.



4. Click the "Performance Measures" link from the navigation menus area.



5. Click the "Edit" link for the respective performance measure to be edited.



6. Edit the contents of the Performance Measure fields.

7. Click the "Save" button and verify that the appropriate changes were made.

## Recommendations

### Create an assessment recommendation

After the PART evaluation is completed, OMB provides agencies with specific recommendations for improving the respective program's performance. These recommendations are released as part of the annual budget. Agencies should review the recommendations and take necessary actions to implement them. Recommendations should be entered into PARTWeb so that agencies can periodically report their progress toward implementing them.

To recreate an assessment recommendation:

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.



3. Click the assessment year for which the recommendation was made.



4. Click the "Recommendations" link from the navigation menus area.

5. Click the "Add Recommendation" button on the recommendations page.

**Test Program 001 Recommendations**

| TEST PROGRAM 001 2005 RECOMMENDATIONS | | |
|---|---|---|
| Add Recommendation | | |
| Type | Recommendation | Action Taken |
| No Recommendations defined. Click "Add Recommendation" above to define one. | | |

6. Enter the Recommendation into the appropriate fields.

**Create New Recommendation**

ADD PROGRAM RECOMMENDATION

Number ▸ 0

Type ▸ [▼]

Recommendation ▸ [                    ]

Action Taken ▸ [                    ]

[SAVE] [CANCEL]

7. Click the "Save" button and verify the appropriate changes have been saved.

## Edit existing assessment recommendation

1. Login as an admin user or a user with permissions to edit a program.
2. From the Home Page, click the appropriate Program title to go to the Program Home Page.

**Program Assessment Rating Tool (PART)**

Please choose an existing Program/Assessment. If your PART does not appear on this screen, y
you have an OMB Program Code and that code has not already been used to associate a progr

| MY PROGRAMS | | | | |
|---|---|---|---|---|
| Code | Program | Assessments | Notes | Actions |
| 10001090 | Science & Technology Program (S & T) | 2005 | | New Assessment |
| TEST_001 | Test Program 001 | | | New Assessment |

3. Click the appropriate assessment year link from the navigation menus area.

**Test Program 001**

| SUMMARY | |
|---|---|
| Program Code | TEST_001 |
| Program Title | Test Program 001 |
| Program Type(s) | Competitive Grant Program , Direct Federal Program , Block/Formula Grant |
| Contact | Test User 001 , 202-555-1212 |
| Notes | Modified Notes for Test Program 001 |

| ASSESSMENTS | | |
|---|---|---|
| Year | Notes | Actions |
| 2005 | Test Program 001 2005 Assessment | |

Create New Assessment

4. Click the "Recommendations" link from the navigation menus area.

5. Click the "Edit" link on a recommendation.



6. Edit the contents of the Recommendation fields.



7. Click the "Save" button and verify the appropriate changes have been saved.

# Section 4: USER ADMINISTRATION

This section reviews agency and OMB administrator tasks related to setting up new user accounts, assigning appropriate permissions (i.e., the authority to create and/or edit various components of PARTWeb including Programs, Assessments, and Teams).

## Users

### Creating a new user

Note: Only Administrators can create new user accounts. Agency and OMB employees who require administrator authority must complete the "MAX Administrators UserID Request Form" (see Appendix A) and fax it along with photocopy of their Federal photo ID to the OMB, Budget Systems Branch at (202) 395-5080.

Agency Administrators should have agency user applicants complete the MAX Users UserID Request Form (see Appendix B) prior to establishing a new account.

1. Login as an admin user.
2. From the Home Page, click the "Administration" menu option.
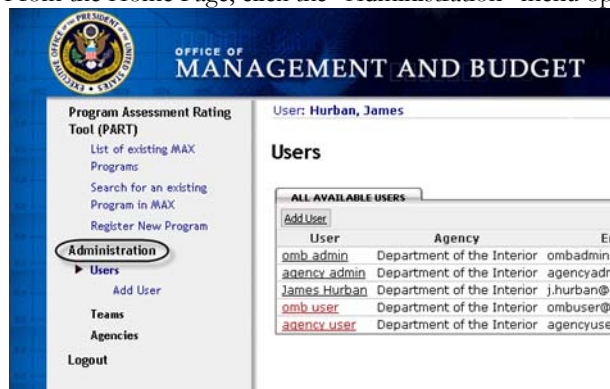


3. Click the "Add User" from the 'all available users' panel.



4. Edit the contents of the Account Information, Agency Information, Role Information, Team Membership Information, and Responsibilities level fields as follows (for a definition of various roles and responsibilities, please see Section 1, "Accessing PARTWeb":

**Add User**

5. Click the "Save" button and verify that the changes were made appropriately.

## Editing a user

1. . Login as an admin user.
2. From the Home Page, click the "Administration" menu option.



3. Click the "omb admin" user link from the 'all available users' panel.

4. Click the "Edit User" button on the 'Account Information for omb admin' panel.



5. Edit the contents of the Account Information, Team Membership Information, and Responsibilities level fields as follows:



6. Click the "Save" button and verify that the changes were made appropriately.

## Teams

PARTWeb provides OMB and Agencies with the ability to set up "teams" as one way to improve communications and collaboration.

## Add a team

1.  Point the browser to `http://<server>/<app>/part`.
2.  Login as an admin user.
3.  From the Home Page navigation menu, click the "Teams" menu option.
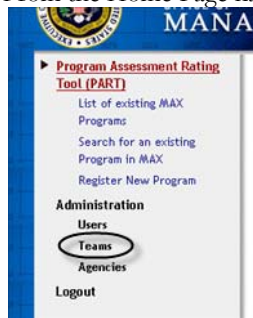


4.  Click the "Add Team" button.



5.  Edit the contents of the Add Team dialog as follows:



6.  Click the "save" button and verify the changes were made appropriately.

## Edit a team

1.  Login as an admin user.
2.  From the Home Page navigation menu, click the "Teams" menu option.
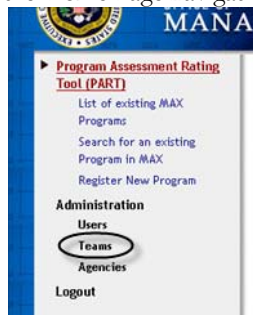


3.  Click the DOC Team "Edit" link.

4. Edit the fields of the Edit Team dialog as follows:



5. Click the "save" button and verify that the appropriate changes were made.

## Add a user to a team

1. Login as an admin user.
2. From the Home Page, click the "Administration" menu option.



3. Click the "omb admin" user link from the 'all available users' panel.



4. Click the "User Teams" link from the navigation menu.

5. Click the "Add User to Team" button.



6. Edit the contents of the Add User Team fields as appropriate:



7. Click the "save" button and verify that the changes were made appropriately.

## Agencies

### Add an agency

1. Login as an admin user.
2. From the Home Page navigation menu, click the "Agencies" menu option.
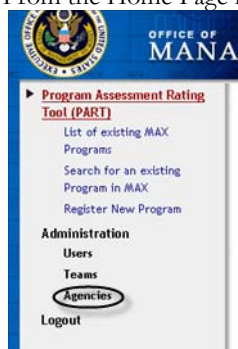
4. Click the "Add Agency" button.



5. Edit the fields of the Add Agency dialog as appropriate:



6. Click the "save" button and verify the changes were made appropriately.

## Edit an agency

1. Login as an admin user.
2. From the Home Page navigation menu, click the "Agencies" menu option.



3. Click the appropriate Agency link.



4. Click the "Edit Agency" button.

5. Edit the fields of the "Edit Agency" dialog as follows:



6. Click the "save" button and verify that the appropriate changes were made.

## Add an agency bureau

1. Login as an admin user.
2. From the Home Page navigation menu, click the "Agencies" menu option.



3. Click the appropriate agency link.



4. Click the "Add Bureau" button.

5. Edit the fields of the Add Agency Bureau dialog.



6. Click the "save" button and verify that the appropriate changes were made.

## Edit an agency bureau

1. Login as an admin user.
2. From the Home Page navigation menu, click the "Agencies" menu option.



3. Click the appropriate Agency link.



4. Click the "Edit" link for the selected Agency.

5. Edit the fields of the Edit Bureau dialog as follows:



6. Click the "save" button and verify the changes were made appropriately.

## Add a user to an agency

1. Login as an admin user.
2. From the Home Page, click the "Administration" menu option.
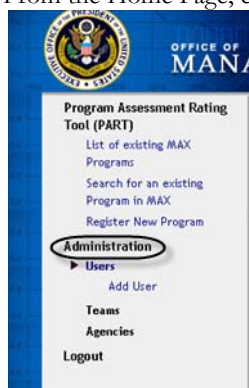


3. Click the "omb admin" user link from the 'all available users' panel.
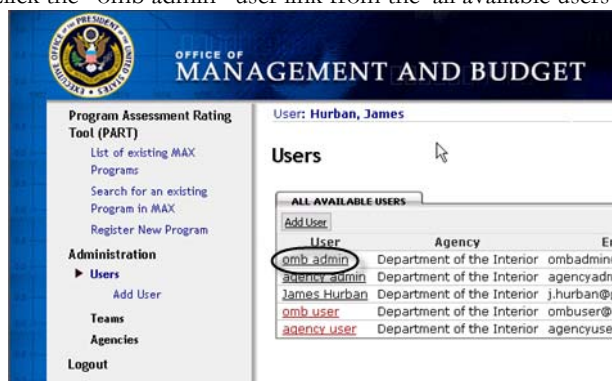


4. Click the "User Agencies" link from the navigation menu.
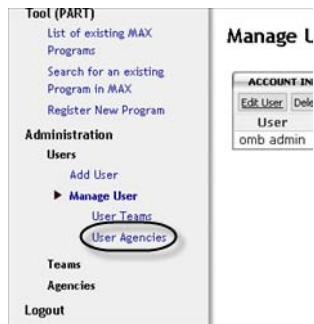
5. Click the "Add User to Agency" button.



6. Choose an agency to add the user to as follows:



7. Click the "save" button and verify that the changes were made appropriately.

## Permissions

PARTWeb's Permissions function enables Administrators to authorize specific user access to various PARTWeb components.

### Check OMB admin user permissions on Home Page

1. Login as an OMB admin user.
2. From the Home Page navigation menu, check the following permissions.



1. The user has permission to the "Administration" links.
2. The user has permission to the "Register New Program" link.

3. The user has permission to the "create a new one" link.
4. The user has permission to the "New Assessment" link.

## Check Agency admin user permissions on Home Page

1. Login as an Agency admin user.
2. From the Home Page navigation menu, check the following permissions.



1. The user has permission to the "Administration" links.
2. The user has permission to the "Register New Program" link.
3. The user has permission to the "create a new one" link.
4. The user has permission to the "New Assessment" link.

## Check OMB user permissions on Home Page

1. Login as an OMB user.
2. From the Home Page navigation menu, check the following permissions.



1. The user does NOT have permission to the "Administration" links or "Register New Program" link.
2. The user does NOT have permission to the "create a new one" link.
3. The user does NOT have permission to the "New Assessment" link.
4.

## Check Agency user permissions on Home Page

1. Login as an Agency user.
2. From the Home Page navigation menu, check the following permissions.

1. The user does NOT have permission to the "Administration" links or "Register New Program" link.
2. The user does NOT have permission to the "create a new one" link.
3. The user does NOT have permission to the "New Assessment" link.

## Check OMB admin user permissions on Program Page

1. Login as an OMB admin user.
2. From the Program Page, check the following permissions.



1. The user has permission to the "Register New Program" link.
2. The user has permission to the "Edit Program", "User Permissions", "Team Permissions", "Create New Assessment", and "Program XML" links.
3. The user has permission to the "Create New Assessment" link.

## Check Agency admin user permissions on Program Page

1. Login as an Agency admin user.
2. From the Program Page, check the following permissions.



1. The user has permission to the "Register New Program" link.
2. The user has permission to the "Edit Program", "User Permissions", "Team Permissions", "Create New Assessment", and "Program XML" links.
3. The user has permission to the "Create New Assessment" link.

## Check OMB user permissions on Program Page

1. Login as an OMB user.
2. From the Program Page, check the following permissions.



1. The user does NOT have permission to the "Edit Program", "User Permissions", "Team Permissions", and "Create New Assessment" links.
2. The user does NOT have permission to the "Create New Assessment" link.

## Check Agency user permissions on Program Page

1. Login as an Agency user.
2. From the Program Page, check the following permissions.



1. The user does NOT have permission to the "Edit Program", "User Permissions", "Team Permissions", and "Create New Assessment" links.
2. The user does NOT have permission to the "Create New Assessment" link.

## Check OMB admin user permissions on Assessment Page

1. Login as an OMB admin user.
2. From the Assessment Page, check the following permissions.

1. The user has permission to the "Edit Assessment", "User Permissions", "Team Permissions", "Funding Accounts", "Question Answers", "Question Weights", "Performance Measures", and "Recommendations" links.



1. The user has permission to the "Add Funding" link.
2. The user has permission to the "Edit" and "Delete" fundings links.
3. The user has permission to the "assign question weights" link.
4. The user has permission to the answer links.



1. The user has permission to the "Add Performance Measure" link.
2. The user has permission to the "Edit" and "Delete" meausers links.
3. The user has permission to the "Add Recommendation" link.
4. The user has permission to the "Edit" and "Delete" recommendations links.

## Check Agency admin user permissions on Assessment Page

1.  Login as an Agency admin user.
2.  From the Assessment Page, check the following permissions.



1. The user has permission to the "Edit Assessment", "User Permissions", "Team Permissions", "Funding Accounts", "Question Answers", "Question Weights", "Performance Measures", and "Recommendations" links.



1.  The user has permission to the "Add Funding" link.
2.  The user has permission to the "Edit" and "Delete" fundings links.
3.  The user has permission to the "assign question weights" link.
4.  The user has permission to the answer links.



1.  The user has permission to the "Add Performance Measure" link.
2.  The user has permission to the "Edit" and "Delete" meausers links.
3.  The user has permission to the "Add Recommendation" link.
4.  The user has permission to the "Edit" and "Delete" recommendations links.

## Check OMB user permissions on Assessment Page

1. Login as an OMB user.
2. From the Assessment Page, check the following permissions.



1. The user has permission to the "Funding Accounts", "Question Answers", "Question Weights", "Performance Measures", and "Recommendations" links.



1. The user has permission to the answer links.



1. The user has permission to the "Display Measure Targets" link.

## Check Agency user permissions on Assessment Page

1. Login as an Agency user.
2. From the Assessment Page, check the following permissions.

1. The user has permission to the "Funding Accounts", "Question Answers", "Question Weights", "Performance Measures", and "Recommendations" links.



1. The user has permission to the answer links.



1. The user has permission to the "Display Measure Targets" link.

## Adding/Editing user permissions for an existing assessment

1. Login as an admin user or a user with permissions to edit a program assessment.
2. From the Home Page, click the "Test Program 001" program title to go to the Program Home Page.



3. Click the "User Permissions" link from the navigation menus area.

4. Edit the contents of the User Permission fields as follows:



5. Click the "Save Permissions" button and verify that the changes were made appropriately.

## Adding/Editing team permissions for an existing assessment

1. Point the browser to `http://<server>/<app>/part`.
2. Login as an admin user or a user with permissions to edit a program assessment.
3. From the Home Page, click the "Test Program 001" program title to go to the Program Home Page.



4. Click the "Team Permissions" link from the navigation menus area.



5. Edit the contents of the Team Permission fields as follows:

**Team Permissions**

| Team | Agency | Admin | View | Write |
|------|--------|-------|------|-------|
| DOC Team | Department of the Interior | ☐ | ☑ | ☑ |
| NPS Team | Department of the Interior | ☐ | ☐ | ☐ |

Save Permissions

6.  Click the "Save Permissions" button and verify that the changes were made appropriately.

# Section 5:  XML Data Transfers

Under development.

# Section 6:  Help

To troubleshoot technical, network, and systems problems with PARTWeb, agency administrators should call the EOP Help Desk at (202) 395-7370 (this is also the MAX A-11 application support).

For questions related to a specific PART program, the agencies should work with their respective OMB examiner.

# Appendix A: MAX Administrators User ID Request Form

## MAX ADMINISTRATORS
## USERID REQUEST FORM

**Administrator Information**

Last Name: _____ First Name: _____MI: __

E-Mail Address: _____

Agency: _____ Bureau: _____

Agency Address: _____

Room Number or Mail Stop _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____ ext _____ Fax Number: _____

**List the Agency or Agency/Bureau you administered:**

| MAX A-11 | PART | Apportionment |
|----------|------|---------------|

## User and Certifier Agreement

This agreement is issued under the authority of the Federal Information Security Management Act of 2002 (P.L. 107-347, Title III).

By signing this agreement, I signify my understanding and acceptance of the policies and practices of the Office of Administration (OA), Executive Office of the President (EOP), concerning access to the EOP's MAX systems and that I will be held accountable for any breach of these policies and practices.

1. The UserID and any other information to allow remote access to the EOP's MAX systems are considered sensitive and critical and will NOT be disclosed to others.
2. I will NOT enter classified information into the EOP MAX systems.
3. I will protect my personal password from disclosure.
4. I will compose my MAX Userid with upper and lower alpha characters and special characters to meet a password length of 6 to 8 characters.
5. I will log off of my computer when it is not attended by me.
6. Upon completion of my duties that involve MAX, I will ensure my UserID is properly disabled.
7. If I suspect someone else has tried to learn my password or fraudulently gain access to the MAX systems, I will report the incident to my OMB representative.

Please print and fax this form to the OMB, Budget Systems Branch at (202) 395-5080. 2
In accordance with Office of Management and Budget Memorandum 04-04, "E Authentication Guidance for Federal Agencies," any non-EOP personnel logging into an EOP system must provide proof of their identity. The MAX Userid Request form must be signed by both the MAX user and the certifier.

I certified that before I issue MAX Userids that I have (1) verified the identity credential of this MAX user (2) obtained a photo copy of the MAX user's government identification badge/pass and (3) have received the MAX Userid Request Form with a signed agreement for my files.
Signature: _____ Date: _____

For Use by OMB Staff Only

By signing this agreement, I certified that I have inspected the MAX Administrators government photo-ID or government identification papers and had verified their employment in _____ (Government Agency).
MAX Admin Signature: _____ Date: _____
Office: _____ Phone #:_____

# Appendix B: MAX USERID REQUEST FORM

## MAX User ID Request Form

**Customer Information**
Last Name: _____ First Name: _____MI: __
E-Mail Address: _____
Agency: _____ Bureau: _____
Agency Address: _____
Room Number or Mail Stop _____
City: _____ State: _____ Zip Code: _____
Phone Number: _____ ext _____ Fax Number: _____

**MAX User Agreement**

This agreement is issued under the authority of the Federal Information Security Management Act of 2002 (P.L. 107-347, Title III).

By signing this agreement, I signify my understanding and acceptance of the policies and practices of the Office of Administration (OA), Executive Office of the President (EOP), concerning access to the EOP's MAX systems and that I will be held accountable for any breach of these policies and practices.

1. The UserID and any other information to allow remote access to the EOP's MAX systems are considered sensitive and critical and will NOT be disclosed to others.
2. I will NOT enter classified information into the EOP MAX systems.
3. I will protect my personal password from disclosure.
4. I will compose my MAX UserID with upper and lower alpha characters and special characters to meet a password length of 6 to 8 characters.
5. I will log off of my computer when it is not attended by me.
6. Upon completion of my duties that involve MAX, I will ensure my UserID is properly disabled.
7. If I suspect someone else has tried to learn my password or fraudulently gain access to the MAX systems, I will report the incident to my OMB representative.

**MAX User Signature: _____ Date:_____**

## MAX Administrator Approval

**Certifier Agreement**
In accordance with Office of Management and Budget Memorandum 04-04, "E Authentication Guidance for Federal Agencies," any non-EOP personnel logging into an EOP system must provide proof of their identity. This form must be signed by both the MAX user and the MAX certifier.
I certified that I have (1) verified the identity credential of this MAX user (2) received the MAX Userid Request Form with a signed agreement for my files.
**Print Name: _____**
**Certifier Signature: _____ Date: _____**